

Basic Elements

Basic System Elements



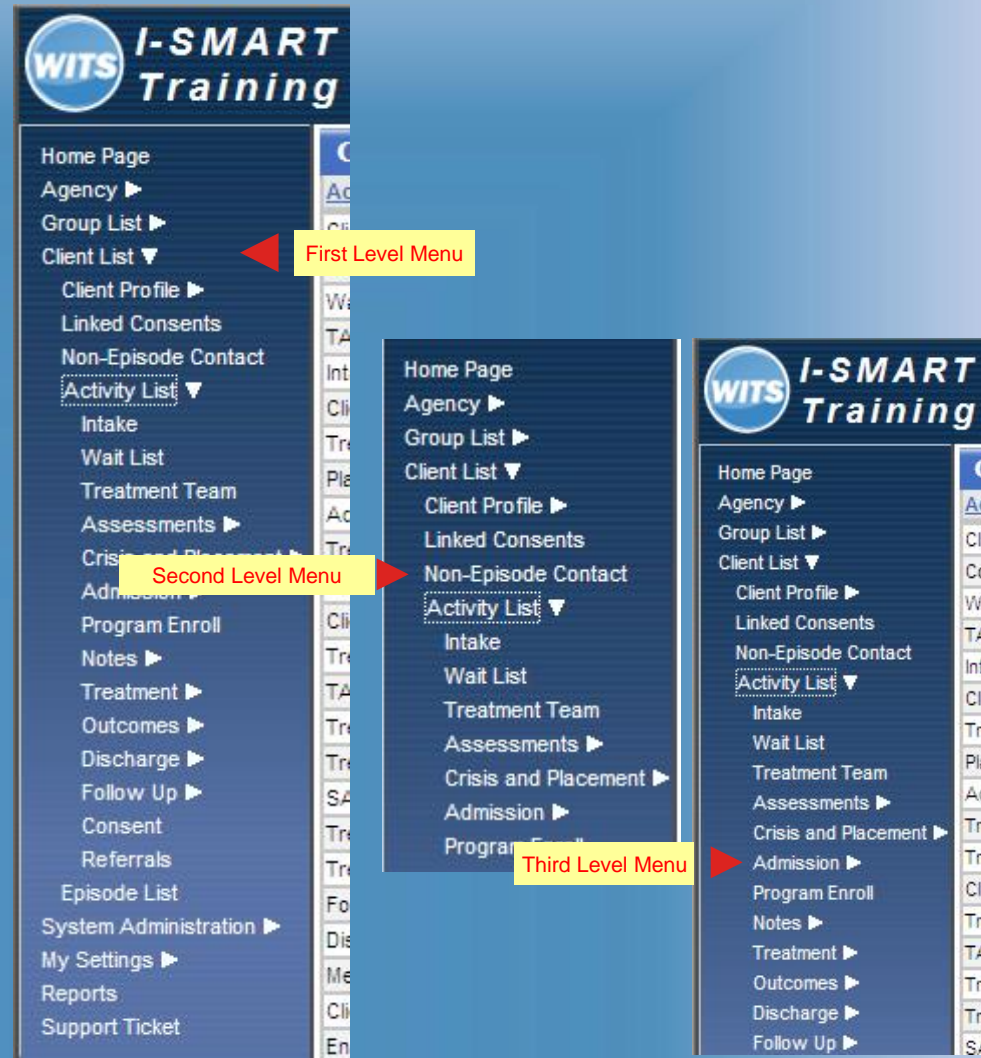
- ✓ Menus
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- ✓ Navigation Buttons
- ✓ Table Actions
- ✓ Controls
- ✓ Messaging
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- ✓ Help
- ✓ Auto-Complete
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Basic Elements

Menus

1. **Menu:** The I-SMART main menu appears in the far left column of the screen. First level menu items are left-most aligned, and may include **Home Page**, **Agency**, **Client List**, **Reports**, and **My Settings**. However, depending on the user's access level, some may not be visible.

There are over 200 screens in I-SMART, but far fewer are used for data entry. For ease of navigation, screens are organized by function. Therefore, **Client List** will have a complement of screens which relate to the management of clients. These screens are accessed and organized through a second level sub-menu.
2. **Sub-menus:** Once the user has selected a higher level function using the First level menu, such as **Client List**, the menu expands to display the second level sub-menu. The sub-menus allow the user to navigate to specific screens without having to use next and back keys. If a menu item has a sub-menu, you will see a small triangle pointing to the right of the label. The triangle will point down when the sub-menu is displayed (menu expands).
3. **Highlighting Selections:** When you place your cursor over a menu item, it is outlined with a dotted box. Use a single, left-click of your mouse to select the menu item and display the associated screen. When selected, the menu item will be outlined with a box.



Note: Scroll bars may appear in the menu column depending on the length and width of the menu.

Basic Elements

Toolbar Icons and Hyperlinks

- Browser Label:** The browser label will depict the name of the screen and the browser vendor. In this example, the user is in the **Home** screen, and the browser vendor is Microsoft Internet Explorer.
- I-SMART Toolbar:** This is the uppermost portion of the screen, and contains the: I-SMART label, User Identity and Context, Print and Help Icons, and logout hyperlink.
- I-SMART Icon:** Wherever you are in the application, you may click the I-SMART label to return to the homepage.
- User Identity and Context:** Three lines are reserved in the toolbar to identify the user's name, their Agency, and the Facility selected in the context screen. The Agency Nickname may be used to reduce the label length since some agency names are too long for the toolbar.
- Print View Icon:** Allows you to print the current screen.
- Print Report Icon:** Allows the user to print a formatted record of the current module.
- Logout:** Use **Logout** rather than closing the browser window to ensure that you will not be locked out upon trying to start a new session. If you close the window using the red X, you will not be able to login from another computer. You will be asked if you are certain you wish to end the session. Click **Yes**.

The screenshots illustrate the I-SMART Training application interface. The first four screenshots show the top toolbar with labels for 'Browser Label', 'Browser Toolbar', 'I-SMART', and 'User identity, Agency and Facility'. The fifth screenshot shows the 'Profile' and 'Client Profile' screens, with red arrows pointing to the 'Print View', 'Print Report', and 'Logout' icons in the bottom toolbar.

Basic Elements

Navigation Buttons

11. **Go:** The **GO** button is used to initiate a query. When used in the login process, it is querying the database to determine if the user is an authorized user. When used in list views, it launches a search for a record based on the data entered in the upper portion of the screen.

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

WITS I-SMART Training User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: 2009, July 1 | 7902155214 | Case #: 1

October 2011
Print View
Logout

The filter you created has been applied to the client list.
Clients whose names are in RED are clients who currently have active alert notes.

Client Search

Agency: Iowa Dept. of Public Health
 First Name:
 Last Name:
 DOB:
 Client ID:
 Provider Client ID:
 Treatment Staff:
 Primary Care Staff:
 Case Status: All Clients
 Number Type:
 Other Number:
 Include Only Active Consents: Yes

Clear **Go**

Client List (Export)



Client ID	Full Name	DOB	SSN	Gender	Actions
7902155214	2009, July 1	1/1/1962	515-87-5214	Male	Profile Activity List Delete Record Linked Consents
7707071234	2010, December 14th	7/7/1977	1234	Female	Profile Activity List Delete Record Linked Consents
5203061234	2010, December 29	3/6/1952	1234	Male	Profile Activity List Delete Record Linked Consents
8703129099	2010, February	3/12/1987	999-09-9099	Male	Profile Activity List Delete Record Linked Consents
5611011257	2010, March 15	11/1/1956	235-84-1257	Male	Profile Activity List Delete Record Linked Consents
7202069852	2011, June 20	2/6/1972	412-45-9852	Female	Profile Activity List Delete Record Linked Consents
6901064201	2011, March	1/6/1969	0002	Female	Profile Activity List Delete Record Linked Consents
5611010002	2011, March 18	11/1/1956	0002	Male	Profile Activity List Delete Record Linked Consents
6901160003	2011, March 20	1/16/1969	0003	Female	Profile Activity List Delete Record Linked Consents

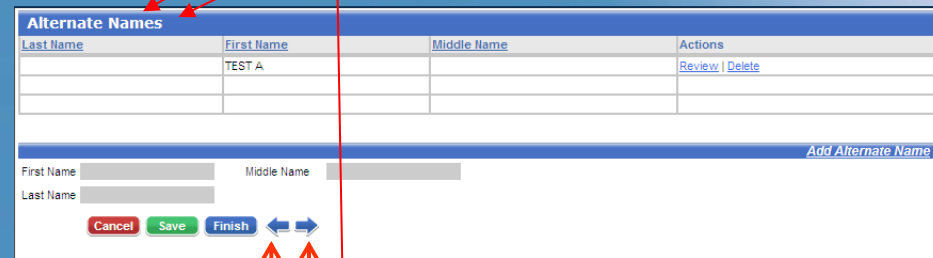
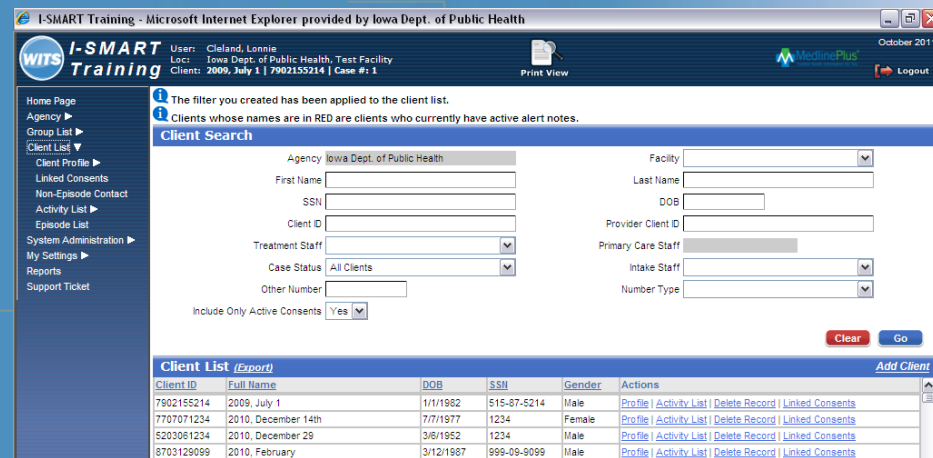
Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
Manning Family Recovery Center	6109306557	hanson, russ	9/30/1961	6557	Male	Activity List Link Remove

Basic Elements

Navigation Buttons

12. **Save:** The **Save** button is used in two ways. First, it allows the user to commit data to the database after completing the required fields, without having to complete the entire form. **Save** may also be used to add multiple records to a list without having to leave the screen. Examples of this function are found on screens such as **Alternate Name**, **Address** and **Phone**.
13. **Cancel:** **Cancel** returns the user to the previous screen or mode without storing the data entered on the screen. In this example, the user was returned to previous *mode (view only)*. They must select **Add Alternate Name** to add more names. In many cases, **Cancel** will take you to the previous screen.
14. **Finish:** The **Finish** button saves any unsaved data, and returns the user to the top of the menu.
15. **Revoke:** The revoke button is used to revoke a consent that was previously authorized. Revoking the consent, time stamps the revocation so that information passed prior to the revocation is not subject to the constraint. Revocations are not retroactive.
16. **Next Arrow:**  takes the user to the **Next** screen in a series of screens which compose a dataset.
17. **Previous Arrow:**  takes the user to the **Previous** screen in a series of screens which compose a dataset.

Basic Elements

Table Actions

18. **Review:** This hyperlink allows the user to either review record details or edit them, depending on their permissions and case status.
19. **Delete:** The **Delete** hyperlink allows users to delete records without requiring them to go to the detailed view. To reduce inadvertent deletes of important data, this feature is only used in tables where most of the critical record information is displayed in the table. In addition, a warning screen asks the user if they want to delete the record, or return to the table.

Alternate Names			
Last Name	First Name	Middle Name	Actions
	TEST A		Review Delete

[Add Alternate Name](#)

First Name Middle Name
 Last Name

I-SMART Training User: Cleland, Lonnie
 Loc: Iowa Dept. of Public Health, Test Facility
 Client: 2009, July 1 | 7902155214 | Case #: 1

Home Page
 Agency ▶
 Group List ▶
 Client List ▼
 Client Profile ▼
 Alternate Names
 Additional Information
 Contact Info
 Collateral Contacts
 Other Numbers
 History
 Allergies
 Linked Consents

Are you sure that you want to delete?

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

I-SMART Training User: Cleland, Lonnie
 Loc: Iowa Dept. of Public Health, Test Facility
 Client: 2009, July 1 | 7902155214 | Case #: 1

Home Page
 Agency ▶
 Group List ▶
 Client List ▼
 Client Profile ▼
 Alternate Names
 Additional Information
 Contact Info
 Collateral Contacts
 Other Numbers
 History
 Allergies
 Linked Consents
 Non-Episode Contact
 Activity List ▶
 Episode List

Alternate Names		
Last Name	First Name	Middle Name

First Name Middle Name
 Last Name

Basic Elements

Controls

- 20. Textbox:** Text boxes are designed to allow the user to enter data manually. Some text fields have specific formats which must be used:

DOB/Date: mm/dd/yy or mm/dd/yyyy

SSN: 9 digit number, dashes do not need to be entered by user. Last 4 digits are also acceptable.

Phone Number: 7 or 10 digit number, dashes do not need to be entered by user.

- 21. Scrolling Textbox:** Scrolling textboxes are used to capture notes and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some have no character limits. An example of a scrolling textbox is a **Comment** field.

- 22. Drop-down box:** A drop down box is used where only one entry may be selected from a list of values.

- 23. Mover Box:** A mover box is used where more than one entry may be selected from a list of values. Use the Ctrl key to highlight more than one choice at a time. Some boxes may scroll.

- 24. Mover Box with Radio Buttons:** The user selects an option with a single left click. Before selecting the mover arrow, they must select an option, using the radio buttons located between the boxes. In this example, if the user selects **# of Days**, they click the **Radio Button**, and put the number of days in the textbox using the keyboard. The user then moves the options to the select box using the right pointing arrow adjacent to the **Selected** box.

First Name

First Name

Note: When a field is read-only, it is grayed-out.

DOB

DOB

SSN

Home Phone #

Comments

Ethnicity

Races	Selected Races
<div>1-Caucasian</div> <div>2-Black/African American</div> <div>4-Asian</div> <div>5-Hawaiian or Pacific Islander</div> <div>6-Alaskan Native</div>	<div>3-American Indian</div>

<div>12-Family/Friends</div> <div>13-Public Assistance</div> <div>14-Retirement/Pension</div>	<div>None</div>
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Consent Options	Consent Expires Upon	Selected Options
<div>Admission</div> <div>Client Diagnosis</div> <div>Client Information/Summary</div> <div>Client Needs Matching</div>	<div><input type="radio"/> Discharge</div> <div><input type="radio"/> # of Days <input type="text"/></div>	

Basic Elements

Messaging

25. **Messages:** I-SMART displays messages and warnings at the top of the screen, just below the toolbar, when required.
26. **Error:** A red circle with an X indicates the failure to provide **required** data. This means that the record cannot be saved until the data is completed. Warnings may be used for incorrect formats, if the incorrect format is for a required field. In addition to the error message, the field in error is colored red. The user may type directly over the red box to correct the data so that it may be saved to the database.
27. **Information Messages:** Information messages direct the user to complete the appropriate steps to continue most tasks in I-SMART. In most cases with information messages, you will not lose data, and you may proceed if you choose to ignore the message.

I-SMART Training - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

WITS I-SMART Training User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: 2009, July 1 | 7902155214 | Case #: 1

Print Report Print View

Required fields are missing.

Client Profile for 2009, July 1

First Name Provider Client ID

Middle Name I-SMART ID

Last Name

Record Created By

Gender Last Updated By

DOB Created Date

SSN Last Updated Date

Driver's License

Ethnicity Selected Races

WITS I-SMART Training User: Cleland, Lonnie
Loc: Iowa Dept. of Public Health, Test Facility
Client: 2009, July 1 | 7902155214 | Case #: 1

Print View

The filter you created has been applied to the client list.

Clients whose names are in RED are clients who currently have active alert notes.

Client Search

Agency

First Name

SSN

Client ID

Treatment Staff

Case Status

Other Number

Include Only Active Consents

Client List (Export)

Basic Elements

Insert, View and Search

28. **General:** There are three modes in I-SMART: Insert, View, and Search. Each mode allows the user to perform a pre-determined set of functions.
29. **Insert:** In most cases, when you first enter a screen, you will be in insert mode. This mode allows you to make entries into most fields in the screen, and save them to the database. When you select a screen from a menu, click next, or use a hyperlink to navigate to a screen, you are usually in this mode.
30. **Read Only:** Sometimes I-SMART will not allow the user to modify any information in the screen. This is usually done to protect data integrity. When you enter a screen in this mode, all fields will be read-only, and grayed out. An example of this is the Closed Case Intake Screen.

However, this view mode is also used in some cases where the user is adding data to a table on the same screen. Examples of this include the addition of addresses and alternate names. In these cases, the Add hyperlinks are used to move the user from view to insert mode.

31. **Search:** Some list screens will allow the user to perform searches based on criteria. When in **Search** mode, you will usually see a **Cancel** and a **Go** button, rather than Save, Cancel, Finish. The Client List is an example of this feature.

The screenshot displays the I-SMART Training interface. At the top, it shows the user's name (Cleland, Lonnie), location (Iowa Dept of Public Health, Test Facility), and client ID (2009, July 1 | 7902155214). The interface is divided into several sections:

- Client Profile for 2009, July 1:** This section contains fields for First Name (July 1), Middle Name, Last Name (2009), Gender (Male), DOB (1/1/1982), SSN (515-87-5214), Driver's License, Ethnicity (0-Not Spanish/Hispanic/Latino Mexican), and Selected Races (1-Caucasian, 2-Black/African American, 4-Asian, 5-Hawaiian or Pacific Islander, 6-Alaskan Native, Unknown, Not Collected). It also shows Record Created By (McCreary, tonia), Last Updated By (McCreary, tonia), Created Date (7/1/2009 1:20 PM), and Last Updated Date (10/12/2010 10:13 AM). Buttons for Cancel, Save, and Finish are at the bottom.
- Intake Case Information for 2010, December 14th:** This section shows Intake Facility (Test Facility), Intake Staff (McCreary, tonia), Initial Contact (By Appointment), County of Res. (03-Allamakee), Source of Referral (21-Self), Case # (1), Case Status (Closed), Date of First Contact (12/10/2010), Intake Date (12/14/2010), Pregnant (Yes), and Due Date (2/9/2011). A Referral Contact field is also present.
- Collateral Contacts:** This section displays a table with columns for First Name, Last Name, Relationship, Phone Number, and Can Contact. It includes an 'Add' button to insert new contacts.
- Client List:** This section shows a list of clients with columns for Client ID, Last Name, DOB, SSN, Gender, and Actions. It includes a search bar and buttons for Cancel, Save, and Finish.

Red arrows indicate the flow between these screens: from the Client Profile to the Intake Case Information, from the Intake Case Information to the Collateral Contacts, and from the Collateral Contacts to the Client List.

Basic Elements

Search

32. **Exact Match:** This type of search is to find records which match the search criteria exactly. Therefore, if you type First Name = James, you will only get Clients who have the first name of James. You may constrain the search results by adding other parameters such as **First Name**, **DOB**, and **Facility** to reduce the number of erroneous results.
33. **Wild Card:** Wild card searches are very useful in cases where you do not have the exact value or spelling of a parameter. It allows you to search with just three characters. To use the wildcard search, place an asterisk after, before, or on both sides of the known characters of the parameter. Hit Search. The Search will return all values with a string of characters which match the characters provided by you.

D*- will return any string starting with D or d.

*s- will return anything ending in s.
34. **Range Expression:** This search allows you to search a range of values when given two specific values. In the Reports Module entering a date range such as 01/01/2000 : 12/31/2000 – returns any record with a date in the year 2000.

Client Search

Agency: Iowa Dept. of Public Health

First Name:

SSN:

Client ID:

Treatment Staff:

Case Status: Clients with Closed Cases

Other Number:

Include Only Active Consents: ☐

Facility:

Last Name:

DOB:

Provider Client ID:

Primary Care Staff:

Intake Staff:

Number Type:

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
5412230285	Client, Admit	12/23/1954	999-08-0285	Male	Profile Activity List Delete Record Linked Consents
5811014536	Client, Demo	11/1/1956	4536	Male	Profile Activity List Delete Record Linked Consents
7606058785	Client, Drew	6/1/1976	999-02-8785	Male	Profile Activity List Delete Record Linked Consents
7611233421	Client, New	11/23/1976	999-87-3421	Female	Profile Activity List Delete Record Linked Consents
5610067896	Client, Old	10/6/1956	999-01-7896	Male	Profile Activity List Delete Record Linked Consents
6509089876	Client, Prison	9/1/1965	999-00-9876	Female	Profile Activity List Delete Record Linked Consents
6610030101	Client, Treatment	10/3/1966	999-04-0101	Male	Profile Activity List Delete Record Linked Consents

Clients with Consents from Outside Agencies

Agency	Client ID	Client Name	DOB	SSN	Gender	Actions
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Basic Elements

Conventions

35. **Required Fields:** Required fields will be indicated by a yellow background.
36. **Incomplete Required Fields:** Incomplete required fields will generate a warning or error, and will be indicated by a red background.
37. **State Required Reporting:** If a field is not required for data integrity, but is required to support reporting requirements for the State or Agency, the background is light yellow.

Required fields are missing.

Client Profile for Client: Admit

First Name Provider Client ID

Middle Name I-SMART ID

Last Name Record Created By

Gender Last Updated By

DOB Created Date

SSN Last Updated Date

Driver's License

Ethnicity

Races Selected Races

2-American Indian

4-Asian

5-Hawaiian or Pacific Islander

6-Alaskan Native

Alternate Names			
Last Name	First Name	Middle Name	Actions

Basic Elements

Help

38. **Mouse-over tips:** Some fields will display a description of the accepted value.
38. **Staff Index Card:** Clicking the Index Card icon next to a staff name will open the staff info window. This allows you to easily find contact information for staff you may not know or for whom you do not have contact information.

I-SMART - Microsoft Internet Explorer provided by Iowa Dept. of Public Health

https://www.i-smart.org/System.aspx

User: Schaller, Elizabeth
Loc: Iowa Dept. of Public Health, Test Facility
Client:

Printable View

November 2012, Rev 3

Logout

Client Search

Agency: Iowa Dept. of Public Health

First Name:

Last Name:

SSN:

DOB:

Client ID:

Provider Client ID:

Treatment Staff:

Primary Care Staff:

Case Status: All Clients

Intake Staff:

Other Number:

Number Type:

Include Only Active Consents: Yes

Clear Go

Client List (Export)

Client ID	Full Name	DOB	SSN	Gender	Actions
3	Male	Profile Activity List Linked Consents			
3	Male	Profile Activity List Linked Consents			
3	Male	Profile Activity List Linked Consents			
4	Female	Profile Activity List Linked Consents			
5	Female	Profile Activity List Linked Consents			

Intake Case Information for Client, Admit

Intake Facility: Test Facility

Intake Staff: Preuss, Eric

Initial Contact: By Appointment

County of Res: 00-Out of State

Source of Referral: 21-Self

Case #2:

Case Status: Open Active

Date of First Contact: 2/18/2011

Intake Date: 2/18/2011

Pregnant: No

Due Date:

Referral Contact:

Add Referral Contact Info

Intake Case Information for Client, Admit - Preuss, Eric

Full Name: Preuss, Eric

Email Address: eric.preuss@idph.iowa.gov

Home Phone:

Work Phone:

Cell Phone:

Fax:

Other Phone:

HIV Positive:

Past IV Drug Use: No

Special Initiative: Drug Endangered Children, Jail Based Assessment/Magellan Special Initiative, Jail Based Treatment/UCS Jackson CADS, Methamphetamine/TCE Grant Only

Inter-Agency Service: Court/Legal Interface, Developmental Disabilities, DHS, Domestic Violence

Treatment Domains: Gambling

Selected Treatment Domains: Substance Abuse

Date Closed:

Save & Close the Case

Cancel Save Finish

Basic Elements

Creating a Shortcut

40. You can make I-SMART a Favorite by clicking the Favorite Star and then Click the Add to button
40. Some browsers allow you to create a shortcut which will save time in completing the login process. To create a shortcut, go to the login page.
41. Right-click in the open area. Select **Create Shortcut** from the menu.
42. You will be told that the shortcut will be added to your desktop. Click **OK**.
43. You will see it on your desktop.
44. Optional. Right click on the icon. Select **Rename**. You may rename the icon to I-SMART.
45. The above can be done before logging into I-SMART.

